



Give them the reason  
to root for you!

## Resco Consumer Apps

Mobile apps for external non-CRM users — create apps integrated with Microsoft Dynamics CRM and give it to your contractors, volunteers, business partners or clients.

Supported mobile platforms:

 iPhone/iPad  Android  Windows

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technology on the move

# Resco Consumer Apps — Mobile apps integrated with your Microsoft Dynamics CRM

A Dynamics CRM application doesn't have to be for employees only. You can create one for external non-CRM users; such as your contractors or clients. Why? Because there are situations, in which you would want them to have some (limited) access to your Dynamics CRM.

## Who is the app for?

### Volunteers

Having a lot of volunteers is great. They spread the word about your non-profit and get a lot of work done, for free. However, managing them can be a hustle. It doesn't have to be. With an app in their hands, they can get updates and notifications from you, ask you or their peers a question, and report back to you once they've completed a task.

### Clients

Think about a gym that wants to do something special for its members. So it gives them an app, in which the members can track their visits, see the list of classes they can take, book a personal trainer, access a collection of healthy recipes, and buy sportswear and nutrition supplements. The app can generate new revenue for the gym and make it stand out from its competition.

### Agents

An insurance company employs external agents that sell the products from its insurance portfolio. The problem is, they are not real employees and, therefore, are not standard CRM users. This makes it hard for them to stay on top of things because they cannot access CRM as their employed counterparts can. By giving them a tool, an app, in which they can access their client and prospect list, keep track of their opportunities, get notified on new products and discounts, you're making the collaboration a lot more effective and easy for both sides.

### City residents

City residents are interested in things that affect them. Give them an app, in which they'll be able to report issues (such as a pothole on a street or damaged speed-limit sign), apply for permits, take part in polls or see when & where the next flea market takes place. The app provides the means for them to be more engaged with the community.

### Fans

A sport club that relies on Microsoft Dynamics CRM is not uncommon. With Resco Consumer Apps, the club has a power-tool in its hands. The fans will go cuckoo over an app that notifies them of upcoming games, gives them the chance to purchase tickets & merchandise, and allows them to chat with other fans or even participate in a Q&A with players.

### Customers

Let's say a company that sells and installs swimming pools recently decided to provide maintenance services as well. To promote and carry out this idea, its customers get an app – they can then use it to easily request a repair or a pool clean-up. It takes only a few seconds of a customer's time to create the order. And the company knows where to go & what tools to bring without needing to ask. It's a win-win.

## Business allies

Your suppliers, business partners & contractors are here to work with you. An app can be an ideal tool to streamline this collaboration. They can manage their data (so you'll, for example, know where to send the invoice), create orders without needing to contact you via phone or email, be updated on pending shipments and much more.

## How does it work?

You can create a consumer app integrated with your Dynamics CRM in 3 steps:

### 1. Select content

Choose the content you want to share. You can use the Woodford customizing tool for this (familiar to those, who have used it for customizing Resco Mobile CRM). If you don't know it, it's a simple drag&drop style of customizing; but you can, of course, do some advanced stuff by using HTML pages with JavaScript.

### 2. Customize the design

Your starting point is the tried & tested Resco Mobile CRM app. Tailor it to fit your company brand. From changing logos, icons and colors to replacing the user interface by with a custom HTML UI on top of the existing one – you can alter almost everything you need to make the app truly yours.

### 3. Distribute the app

Use the existing Resco Mobile CRM application that's already available on app stores or get Resco to submit an app for you. Once it's on the store, you can go ahead and promote it to your target audience. Send out emails, post on social media, call people and let them know your app's out there.

## How can a user log in?

Since an external user doesn't have Dynamics CRM credentials as an employee does, login into the app is a bit different than a standard Resco Mobile CRM login.

### What can people do in the app?

- Create records
- View order history
- Update their data
- Assign records
- Save leads and opportunities
- Sign orders and reports
- Scan barcodes & QR codes
- Capture photos
- Attach documents
- Use a map
- Place phone calls
- Send e-mails
- Navigate to destinations
- See activities in a calendar
- Get reminders
- Save things to favorites
- Get updates on new promotions
- Browse presentations
- Calculate orders
- View progress of a shipment





## You can choose from 2 available options:

### Anonymous login

A user that is anonymous can simply download the app and see the content. No login required. This means every person will see the same thing as the next one. This scenario is good for cases when you don't need to distribute specialized, targeted info; such as for city residents, customers or visitors.

### Registered user login

A registered user is someone who has login credentials, meaning, on the first start of the app, he is prompted to log in with a name and a password. Now, this name and password can be any field from your CRM database; such as email for login name and password that's automatically generated, filled in by you or chosen by the user upon registering.

You can distribute the name and password to users, manually approve them after they fill in the registration form, or have it automatically approved. Whichever works best for you.

Once a registered user signs in, he can see the general content, but also a handpicked selection of data. For instance, a business partner would see their address fields from CRM, so they can update them whenever necessary, create orders that will be assigned to them, or see recent product promotions.

## What Dynamics license do you need?

Since the introduction of Dynamics CRM 2015 you don't need an external connector license for third-party access to your Dynamics CRM server, as it is automatically included within the standard server license. No additional expenses required.

## Connect beyond Dynamics CRM

Every Resco Consumer Apps license includes access to our own CRM server. This enables you to create and connect consumer apps also with Oracle Siebel or other back-end systems such as SAP or Salesforce.

And if you use Resco's CRM server as your standalone CRM solution, you can start creating apps from the server's customization console instantly.

For more information on these options, please contact us at [mobilecrm@resco.net](mailto:mobilecrm@resco.net).

## Why not a custom app?

Starting from scratch can take a lot of time & money. Take advantage of your existing structure and create an app that's integrated with your database. It's a cost-effective and time-saving alternative to custom development.

## Get in touch!

[www.resco.net](http://www.resco.net)

North America: +1 (617) 336-7238

[mobilecrm@resco.net](mailto:mobilecrm@resco.net)

Rest of the World: +421 2 209 02 019

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